



Proposal “Roadmap To Success” Checklist

Step 1. Qualify The Opportunity.

- Customer has dollars already budgeted ?
- Need is critical to the customer ?
- Have deep insight or first-hand customer knowledge ?
- Sufficient reaction time (>3 weeks) ?
- Appears to be an open (not wired) competition ?
- Reputable customer (D&B, credit check, etc.) ?
- Can do the work, and well ?
- OVERRIDE: Requested by name, by the customer?

If the first 7 boxes out of the 8, or the last box, are checked the opportunity is “real” and is a viable pursuit. Go to the next step.

Step 2. Determine The Probability The Opportunity Can Be Won.

- Repeat customer
- Market dominance (brand name)
- Little or no competition
- A unique service
- Industry credentials

If one or more boxes are checked the probability of a win is above average. If no boxes are checked the proposal will need to be compelling and written very, very well. Proceed to the next set of criteria.

Step 3. Determine The Probability Of Being A Viable Competitor.

- Bad credit or other Rating
- Bad publicity
- No homework on competitors
- Missed requirements
- Price (too low or too high)**
- Interpersonal skills
- Prior failure with the customer**

If either the 5th or 7th box is checked, abandon pursuit of the opportunity. If any of the other boxes are checked in upper or lower boxes, discuss with leadership for a decision to pursue or not. If pursuing the opportunity, go to the next step.

Step 4. Organize For Success

- Page budget defined?**
- Milestones defined ?
- Exit criteria defined ?
- Standards for writing quality defined ?
- Process defined and everyone educated on the process ?
- Research needs defined and assigned ?
- One person assigned as in-charge ?
- Dedicated research time and place established ?

If all boxes are checked, the proposal activity is organized to succeed. Go to the next step.

Step 5. Get The Information Necessary To Write Effectively.

- Market and industry issues identified ?
- Basic terminology understood ?
- Decision-maker reader identified (C-level, finance, HR, etc.) ?
- The key competitors identified ?
- Facts and metrics gathered (if needed) ?
- Proposal formatting instructions understood ?

If any one or more of the 6 boxes are checked, go to the next step.

Step 6. Write The Kind Of Content That Wins (This is an outlining step).

- Quality solution
- Clear means to get the result
- Communicated clearly
- At a good value
- From someone trustworthy

If all of the 5 boxes above are checked (the 4th box may be deferred until pricing activity is done), the proposal is constructed well; proceed to the next set of criteria.

- “Self Love” Narratives (up front or too long)
- Wrong solution
- Lack of insight (into the customer’s industry or problem)
- Missed requirements
- Wrong Price
- Communicated confusingly
- Attention to detail

If any one or more of the 7 boxes are checked the proposal is at a disadvantage. Either correct the document, or pursuit of the opportunity should cease. If appropriate, go to the next step.

Step 7. Write The Kind Of Style That Wins.

- Solution “up front”
- Clarity
- Brevity
- Clear requirements traceability
- Customer format specifications met
- No spelling, capitalization, other errors

If all of the 6 boxes above are checked, the proposal is well written; proceed to the next set of criteria.

- “Self love” narrative
- “BS” narrative hiding weak capabilities
- Wordiness
- Excessive technical jargon
- Spelling, capitalization, other errors

If any of the 5 boxes above are checked, either correct the item, then go to the next step, or cease working on the opportunity.

Step 8. Review The Final Document.

- Choose a review method
- Set review time limits (to avoid analysis-paralysis)
- Appoint one person to approve or disapprove changes
- Provide the RFP document to the reviewers
- Perform final grammatical checks

Once all boxes are checked, continue to the remaining steps.

Step 9. Develop Pricing.

- Select a pricing strategy appropriate to the opportunity. This is a complex topic and not addressed in this checklist.

Step 10. Perform Finishing, Assembly, And Delivery.

- This topic is not addressed in this checklist but should be an integrated part of the process.